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FinancialPlanning

Retirement

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Reporter

Hello!

As you may be aware, there's a lot of uncertainty these days. (Shocking, I know.)

What will the Social Security cost of living adjustment (COLA) be for 2025?

What will the expected Federal Reserve rate cut mean for portfolios?

Which of the two major party's presidential candidates' economic visions will prevail in November and what will it mean for clients?

Luckily, this week, I was able to speak with several knowledgeable analysts and financial advisors to make sense of all this. I hope you'll check these stories out.

As always, thank you for reading. Talk to you next Wednesday!

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TOP STORIES

ELECTION 2024

Harris vs. Trump: What financial advisors are watching in their economic proposals

The outcome of the November election is likely to have a significant effect on interest rates, tax cuts and deregulation — in turn affecting client portfolios.

- **How the Fed's expected interest rate cut may affect client portfolios**
  The federal funds rate is currently at 5.25% to 5.50%, the highest in over two decades, but many financial advisors and analysts see that falling as soon as next month.

- **The 20 ETFs with the biggest outflows of July 2024**
  The first half of 2024 marked a record stretch for ETFs, but not all funds were lifted by the rising tide.
- **Falling inflation figures could mean an even smaller Social Security COLA in 2025**
  The next few weeks will be critical as the COLA is determined on the average inflation rate in the third quarter — July, August and September — versus the average third-quarter inflation a year ago.
- **The top 20 small-cap ETFs of the past decade**
  Small-cap funds may be an attractive element of a diversified portfolio, but you wouldn't necessarily know that looking at the data from this year.

Read the latest in Retirement

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This is how to answer 'How Do You Define Success?' in a job interview

Telling your interviewer that your measure of career success is getting to the end of the workday with your mental health intact probably won't cut it.

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